ePM

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Connection

In This Issue:

What's Next? for *EV*

GSA would like to recognize all the Capital Project teams that are included in the FY12 Earned Value measure. We know that it took considerable time and effort for project teams - including the PM, Budget Analysts, Contracting Officers, RSA's, and CMs - to collect and enter this data. The question now is, what do you do next?

Tracking EV requires continual data updates to contract modifications and invoices. If an ePM invoice is not uploaded into the system for more than 90 days, ePM will turn both On-schedule and On-budget indicators **red**. Invoices, and new modifications must be kept current in order for EV to report accurately. Contractors also have access to their contract modifications, and the ability to submit their "pencil copy" invoice via ePM. With invoices particularly, this "pencil copy" can then serve to update the invoice data for EV tracking. The GSA project team can then review, make adjustments and approve (in the ePM workflow).

Going forward, project teams will need to be sure to allocate time on a monthly basis to input the latest invoice and modifications for their projects.

Small Projects Community Update:

ePMXpress 2.0 Update: The discovery and requirements development phases are complete. These phases gave the requirements team an opportunity to meet (via Webex) with the developers. The developers are currently coding the software and will be having design reviews as they progress through the design which will allow GSA to confirm both the look and the functionality of the software. Meridian (the software developer of ePM) is on track to deliver a pre-release version for user acceptance testing in October with a full release of the software in the production environment in November. Training of the software will occur in Oct for those involved in user acceptance testing followed by general training for all users beginning in November.

Land Ports Of Entry

A new program was developed in ePM to capture all of the Land Ports of Entry (LPOE) projects that are managed by the LPOE Special Programs Division (SPD). It assists the SPD in managing those projects that are fully funded by Reimbursable Work Authorizations (RWA's). One project includes 28 LPOE projects rolled into one. Recently, Gary Ragatz (contracted project manager) provided insights about ePM and its impact for the team.

> "The system has given us everything we need". - Gary Ragatz, Project Manager

The project team started using ePM approximately halfway through the project, which was challenging but easily overcome through training. Gary made sure all team members were present at the training and he said his contractors picked it up quickly. The contractors are an instrumental success factor in using ePM to manage the project. Ragatz is excited to use the tool to manage the many complexities involved with coordinating between 28 LPOEs.

The major ePM successes for the team are the storing design documents, enabling design reviews, allowing RFI processing, submittal management, daily reports, issue management, and capturing meeting minutes. The team appreciates ePM's document management capabilities since the allowable file size in ePM exceeds that of email. The team found the document review process useful in the Design and Submittal modules.

The project team initially started out using the Capital Project ePM minimum requirements since as one ePM project the total project cost is over the prospectus threshold. However, since all the individual projects fall into the small project category it was decided the Small Project minimum requirements more closely matched the format of this project.

One of the challenges in adopting and using ePM is that some project members are not "computer guys" so they have more experience with running projects. As the project progresses, members are embracing ePM and learning solutions to overcome the challenges. One learning curve was understanding the workflow and the impact of the different ePM states. For example, if an attachment was left off a document before workflowing it in ePM, the change in workflow state may disable editing rights for the initiator and give the edit rights to the receiver to perform the required action. The takeaway from this is to be sure everything is accurate before workflowing documents. There is no undo button related to this process, but if needed the RSA can assist the team in resetting a document to a previous state.

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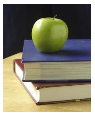

ePM Quick Tip:

When transferring money from an existing cost account into a new cost account, there is an important step you must complete. You must create a $0 funding document and hand off the cost, which will create a cost line item in the account. Then the money will transfer into that line item, and the transfer document can be executed successfully.

ePM Resources:

ePM Support
epmsupport@gsa.gov
1 (866) 367-7878

ePM Login Site
https://epm.pbs.gsa.gov/proliance

GSA User Resources
http://insite.pbs.gsa.gov/epm

Training Videos and Quick Reference Guides
http://www.meridiansystems.com/

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SPD is a unique division of GSA. As a part of PBS Central Office, they assist the customer agencies in managing and implementing their national programs across the GSA regions; fully reimbursed for their efforts and travel through the funds received via RWA's. To be able to decipher which documents belong to which project, the team developed a numbering system to organize the information and used it as the document title in ePM. The formula is below:

First part of each code is either OT3, PH, or OT3PH

- Second part identifies the Zone or Project Phase. We use Z0 to mean general, while Z1 means a project in Zone 1
- Third part of the code is site specific, so GEN would be general while SLU (CBP 3 digit code for LPOE) identifies the project site as San Luis 1, AZ.
- The last is the system generated number.

An example of the number system is OT3-Z2-SLU-00001. This indicates that this is an OT3 project, in Zone 2, at San Luis 1, AZ and is the first instance of this document type.

The Suite of Planning Tools (SOPT) application is coming online in October 2012, which will help you more efficiently plan your projects. The SOPT, replaces a lot of the functions formerly in PIP and automates project management templates via the web, which makes it easier to develop and revise project planning documents. Templates include the Project Charter, Project Management Plan, Risk Assessment Tool, Needs Assessment Interview, Housing Plan and Prospectus Builder. Features, such as, single sign on and work product cloning will allow you to get started quickly saving time.

The good news is that the SOPT and ePM teams are working closely to ensure both systems are integrated with each other. This means that you will not have to enter the same information into different places within the tools. Current integration will include shared project records and ePM project data pre-loaded into templates. Planned future integration includes automated transfer of completed templates into ePM card catalogs, as well as data transfer from the SOPT into ePM.

Look out for more information in the coming months on this exciting new application. Post questions to the Suite of Planning Tools page on Chatter.